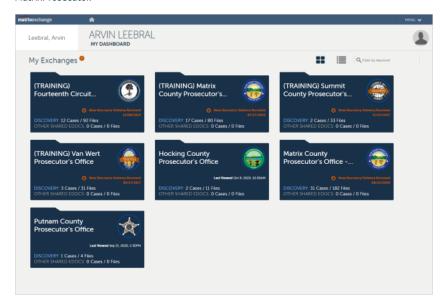
You are here: Matrix Features > MatrixExchange

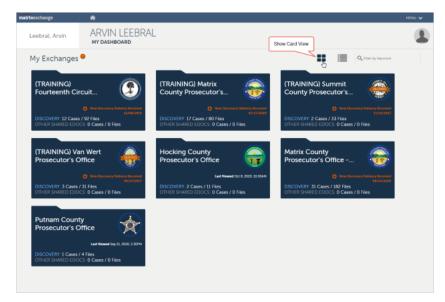
# MATRIXEXCHANGE USER GUIDE

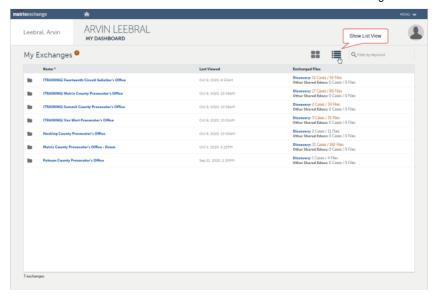
MatrixExchange: Discovery provides secure electronic document delivery and receipt tracking. It allows defense attorneys to make an electronic discovery demand, receive email notifications when a prosecutor has responded and access all documents sent from MatrixProsecutor.



## **HOME PAGE: MY DASHBOARD**

The home page ("My Dashboard") shows you each Prosecutor's Office where you have registered to receive Discovery via MatrixExchange. You can view them as cards or in a list.





Click the Prosecutor's Office Name to view your cases with that Office.

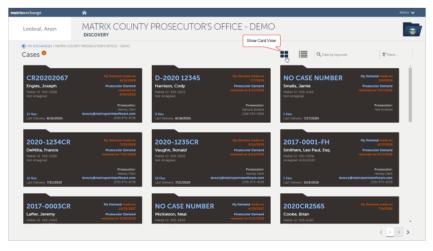
# FINDING AND VIEWING CASES

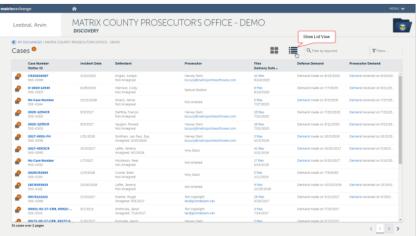
When you open the file for a given Prosecutor's Office, you will see the active cases that have been assigned to you. The toolbar (pictured below) provides various ways to view and filter your cases.



# Show Card View Or List View

Select how you want to view your Cases: Card View or List View.





In **Card View**, Cases are easy to view and interact with at a glance. In **List View**, your cases can be sorted by a column header. Filter By Keyword (Quick Search)

Quickly find a case by a keyword such as the Defendant's name or Case Number:



**Tip:** The keyword filter applies to cases within your current view. If you do not see the case you're looking for, adjust your **Filters** as described below.

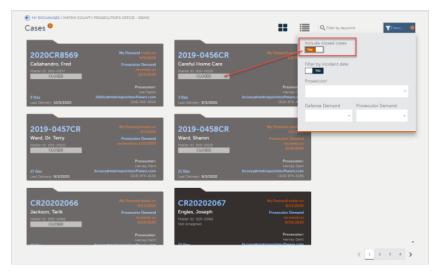
# Filters... See More (Or Fewer) Cases

Add or remove Cases from your view using the Filter dropdown.



#### **Include Closed Cases**

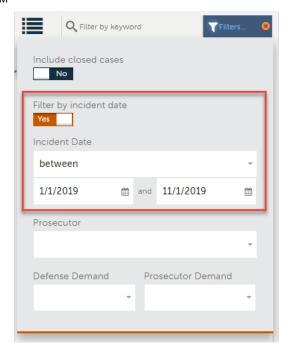
If you do not see a Case you are looking for, try setting **Include Closed Cases** to **Yes**. In MatrixExchange, a Case is considered **Closed** (i.e. Inactive) when any of the following are true (based on the data in MatrixProsecutor):



- • The Defendant's Case has a Disposition
  - The Defendant has been No Billed
  - You are currently not the Defendant's Active Attorney based on the Assignment From Through Dates (when, for example, the Defendant has new representation).

#### Filter by Incident Date

If you have a lot of Active Cases, it may help to narrow your view based on when the incident occurred.



#### Filter by Prosecutor

Limit your view to Cases assigned to the selected **Prosecutor** or **Prosecutors**.

#### **Defense Demand**

- • Delivered You have made a demand for discovery, and the discovery was delivered by the Prosecutor's Office
  - Not Requested You have not made a demand for discovery
  - Requested You have made a demand for discovery, but the discovery has not been delivered by the Prosecutor's Office

#### **Prosecutor Demand**

- • Delivered The Prosecutor made a demand for discovery, and the discovery has been received by the Prosecutor's Office
  - Not Requested The Prosecutor has not made a demand for discovery
  - Requested The Prosecutor made a demand for discovery, but the discovery has not been received by the Prosecutor's Office

## Clear All Filters

When your view is filtered, the box is highlighted in blue. Click the orange x to clear all filters. The system remembers your filter settings across login sessions, so if you log out of the system while filters are on, they will still be on when you log back in.



## MAKING THE DEFENSE DEMAND FOR DISCOVERY

MatrixExchange allows you to send an electronic Demand for discovery to the Prosecutor's Office.

Note: Making the Defense Demand from MatrixExchange does not replace filing a demand with the Court.

### 1. 1. Click Make Demand.

- • From Card View: Click the Make Demand button.
- From List View: Click the link in the Defense Demand column.



- 2. Matrix generates a motion for Discovery for you to review and sign.
  - c.a. Enter your Initials as your electronic signature.
  - b. Click **Accept** to affix your signature and deliver the Demand to the Prosecutor's Office.



You can view, print, and save a copy of the signed Demand at any time. From **Card View**, click **My Demand**. From **List View**, click the **Demand** link in the **Defense Demand** column.



#### **VIEWING DISCOVERY**

When discovery has been delivered, the number of files in the package appears as a hyperlink. The Case Number also becomes a link.

1. 1. Click the Case Number or Files link.



2. Click a file **Name**. Documents open as PDF files that can be viewed, saved, or printed. Multimedia files will open in the appropriate media player, where they can be played, saved, or burned to a disc.



3. Click **Download All** to download the complete package into a zip file.



4. When you view or download a file, the Last Accessed column will be updated with the date and time.



To return to your list of Cases, or to your Dashboard, use the links above the page title ("Received Discovery Files"). Click the Prosecutor's Office Name to view all Cases with that Office. Click "My Exchanges" to view all Prosecutor's Offices.

